

3. PARTICIPANT SEARCH, FOLDER AND SUMMARY2

3.1 PARTICIPANT LIST2

3.2 MENUS10

3.3 PARTICIPANT FOLDER17

3.4 MENU EXCEPTIONS21

3.5 BREASTFEEDING ITEM ISSUANCE HISTORY23

3. Participant Search, Folder and Summary

3.1 Participant List

The initial window of the WIC system allows the user to reach all functions of the system, including the Participant Folder, Build Master Calendar, Local Agency Outreach, System Outputs and System Tools. The Participant List creates the foundation of the WIC Central Administrative Site application. This document describes the various functions for searching and displaying the participant list. The Participant list can be sorted and displayed in several ways.

This criterion is the current view of the participant list. The current view is an Agency level view initially set upon login of the system.

The title bar and columns of each window will change to reflect the selected View.

Household ID	State WIC ID	Last Name	First Name	MI	Date of Birth	WIC Category
00726557	00726557	PATE	REONA		10/03/2000	Child
00724977	00724977	PATE	ERONA		04/12/1978	Breastfeeding
00806780	00806780	PATE	RIKKEA		06/23/2002	Child
00708328	00708328	PATE	SANDRA	A	08/03/1961	Pregnant
00809945	00809945	PATE	LYNETTE	Y	12/07/1980	Breastfeeding
00717925	00717925	PATTEN	QUANISHA		09/20/1972	Non-breastfeeding
00813558	00813558	PATTEN	D'MARKUS		07/15/2003	Infant
00810238	00810238	PATTEN	VERNON		01/03/2000	Child
00742972	00742972	PATTEN	ANGEL	L	05/30/2002	Child
00811802	00811802	PATTEN	VER'NAISHA		11/05/2002	Child
00738688	00738688	PATTERMAN	SAMANTHA		02/12/2002	Child
00822066	00822066	PATTERSON	LORY	M	08/24/1986	Pregnant
00822077	00822077	PATTERSON	MYA		10/28/2002	Child
00802507	00802507	PATTERSON	MYERI	A	05/17/2000	Child
00738312	00738312	PATTERSON	RASHAUDE		12/02/2001	Child
00737804	00737804	PATTERSON	ADRIAN		01/26/2002	Child
00813409	00813409	PATTERSON	YOLANDA	Y	03/03/1984	Non-breastfeeding
00818371	00818371	PATTERSON	KIMLYN		02/02/1976	Breastfeeding
00732094	00732094	PATTERSON	HAILIE	M	02/21/2001	Child
00802506	00802506	PATTERSON	ANAYA	P	07/03/2001	Child
00809583	00809583	PATTERSON	JAILEN		10/09/2002	Child

Figure 1 - Participant List (Details Hidden)

The screenshot shows the 'Participant List' application window. It has a menu bar with 'File', 'Participant List', 'Activities', and 'Help'. Below the menu is a toolbar with icons for search, print, and other functions. The main area is divided into sections for search filters, a table of participants, and summary statistics.

Search Filters:

- Where to Search:** Radio buttons for On-site, Local, Statewide, and Appointments for Today. 'Statewide' is selected.
- Program:** A dropdown menu showing 'WIC'.
- Demographics:**
 - Last Name:** Text input field containing 'PATT'.
 - First Name:** Text input field.
 - MI:** Text input field.
 - SSN:** Text input field.
 - Agency:** Text input field.
 - Date of Birth:** A dropdown menu showing '(none)'.

Buttons: 'Search', 'Clear', and 'Hide Details'.

Table of Participants:

Household ID	State WIC ID	Last Name	First Name	MI	Date of Birth	WIC Category
00726657	00726657	PATE	REONA		10/03/2000	Child
00724977	00724977	PATE	ERONA		04/12/1978	Breastfeeding
00806780	00806780	PATE	RIKKEA		06/23/2002	Child
00708328	00708328	PATE	SANDRA	A	08/03/1961	Pregnant
00809945	00809945	PATE	LYNETTE	Y	12/07/1980	Breastfeeding
00717925	00717925	PATTEN	QUANISHA		09/20/1972	Non-breastfeeding
00813558	00813558	PATTEN	D'MARIKUS		07/15/2003	Infant
00810238	00810238	PATTEN	VERNON		01/03/2000	Child
00742972	00742972	PATTEN	ANGEL	L	05/30/2002	Child
00811802	00811802	PATTEN	VERNAISHA		11/05/2002	Child
00738688	00738688	PATTERMAN	SAMANTHA		02/12/2002	Child
00822066	00822066	PATTERSON	LORY	M	08/24/1986	Pregnant
00822077	00822077	PATTERSON	MYA		10/28/2002	Child
00802507	00802507	PATTERSON	MYERI	A	05/17/2000	Child
00738312	00738312	PATTERSON	RASHAINE		12/02/2001	Child

Summary Statistics:

- WIC Status:** Child
- Gender:** Female
- Termination Date:** 11/18/2003
- Certification Effective:** 11/17/2000
- Certification End:** 10/04/2003
- Termination Reason:**
- Last Date to Use WIC:**
- Issuance Frequency:**

Figure 2 - Participant List (Details Shown)

3.1.1 Controls

This section describes the behavior of the controls on the Participant List window.

3.1.1.1 Where to Search Radio Button Group

The radio button group consists of the following buttons:

- On-site
- Local
- Statewide
- Appointments for Today

The radio button group will be disabled when the window is active.

3.1.1.2 Program Dropdown

This control allows the user to indicate which Program database to include in the search criteria. This dropdown will always display the 'WIC' program. Additional programs will be displayed if applicable to your state requirements.

3.1.1.3 State WIC ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is active. When this radio button is selected, the State WIC ID masked edit box will be enabled. Otherwise the masked edit box will be disabled. The masked edit box will only allow entry of alphanumeric characters. The mask for the box will be "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

3.1.1.4 Household ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is Active. When this radio button is selected, the Household ID masked edit box will be enabled. Otherwise, the masked edit box will be disabled. The masked edit box will only allow entry of alphanumeric digits. The mask for the box will be "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

3.1.1.5 Demographics Radio Button

The radio button is enabled when the Participant List is Active. When this radio button is selected, the demographic controls become enabled. Otherwise, the Demographic controls will be disabled.

3.1.1.6 Demographics - Last Name Text Box

This control allows the user to enter a complete or partial last name as search criteria. The text box will be enabled when the Demographic radio button is selected. The maximum size of this control will be twenty-five (25) characters. Only characters A-Z, {space}, and the following characters (' , -) are allowed. It will convert all entered characters to upper case.

3.1.1.7 Demographics – Date of Birth Masked Edit Box

This control allows the user to select the Date of Birth as search criteria. The masked edit box will be enabled when the Demographics radio button is selected. It will allow the entry of numeric characters. The mask for the box will be "#####" to accept a date with a four digit year.

3.1.1.8 Demographics - First Name Text Box

This control allows the user to enter a complete or partial first name as search criteria. The text box will be enabled when the Demographic radio button is selected. Only characters A-Z, {space}, and the following characters (' . , -) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be twenty (20) characters.

3.1.1.9 Demographics - Middle Initial Text Box (MI)

This control allows the user to enter the middle initial as search criteria. The text box will be enabled when the Demographic radio button is selected. Only characters A-Z are allowed. It will convert all entered characters to upper case. The maximum size of this control will be one (1) character.

3.1.1.10 Demographics – SSN Masked Edit Box

This control allows the user to enter the social security number as search criteria. The masked edit box will be enabled when the Demographics radio button is selected. It will only allow the entry of numeric characters. The mask for the box will be “###-##-###”.

3.1.1.11 Agency Dropdown Box

The dropdown box will be disabled when the Participant List Window is active. The control will display the Agency location selected from the Select Location dialog. This is a read-only control.

3.1.1.12 Search button

The Search button will be enabled when the Participant List window is active. It will have a mnemonic of ‘S’.

3.1.1.13 Clear button

The Clear button will be enabled when the Participant List window is active. It will have a mnemonic of ‘C’.

3.1.1.14 Show/Hide Details button

The Show/Hide button will be enabled when the Participant List window is active. It will have a mnemonic of ‘D’.

3.1.1.15 Participant List Grid

This control allows the user to select the appropriate participant with which to work.

The participant list will be initially sorted by Last Name, First Name, and Middle Initial. The first entry will initially be selected. The participant list grid will contain the following columns:

- Household ID
- State WIC ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Clinic Number

Double-clicking on a participant's record in the grid will [open the participant folder](#) for the selected participant.

3.1.1.16 Detail Panel - WIC Category Text and Value Label

This control allows the user to view the WIC Category at the most recent certification for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the WIC-Status attribute of the MEMBER entity. It will invoke as read-only in the inverse color of the form.

3.1.1.17 Detail Panel - Gender Text and Value Label

This control allows the user to view the gender of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Gender attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form.

3.1.1.18 Detail Panel - Certification Effective Text and Value Label

This control allows the user to view the effective date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEffectiveDate attribute of the CERTCONTACT entity.

3.1.1.19 Detail Panel - Certification End Text and Value Label

This control allows the user to view the end date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEndDate attribute of the CERTCONTACT entity.

3.1.1.20 Detail Panel - Termination Date Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination date for the participant selected in the participant list. If the Terminated attribute of the MEMBER entity is 'Y', the value of the Terminated-Date attribute of the MEMBER entity will be invoked. If the Terminated attribute of the MEMBER entity is not 'Y', the text "N/A" will be invoked. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the window.

3.1.1.21 Detail Panel - Terminated Reason Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination reason for the participant selected in the participant list. When a date is invoked in the Termination Date field, the value label will invoke the description from the ReferenceDictionary entity where attribute CATEGORY = 'TERMREASON' associated with the value of the Cert-Termination-Reason attribute of the CERT-CONTACT entity. If "N/A" is invoked in the Termination Date field, the value label will invoke "N/A". It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the window.

3.1.1.22 Detail Panel - Last Date to Use – WIC Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the last date to use of the last WIC check issued to the participant selected in the participant list. The value label will invoke the value of the Last-Check-LDTU attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the window.

3.1.1.23 Detail Panel - Last Date to Use – Farmers Market Text and Value Label

This control is not applicable to SPIRIT.

3.1.1.24 Detail Panel - Issuance Frequency Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the issuance frequency of the participant selected in the participant list. The value label will invoke the value of the look up value of the IssuanceFrequency attribute of the MEMBER entity. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the window.

3.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Participant List window.

3.1.2.1 Initializing the Interface

Upon initial presentation of the window:

- The title part text will be set to “Participant List”.
- The Program dropdown will default to “WIC”.
- The State WIC ID radio button will initially be selected.
- The following controls are initially blank (and disabled where indicated in parenthesis)
 - State WIC ID radio button
 - State WIC ID masked edit box
 - Household ID radio button
 - Household ID masked edit box (disabled)
 - Demographics radio button
 - Last Name text box (disabled)
 - First Name text box (disabled)
 - MI text box (disabled)
 - Date of Birth masked edit box (disabled)
 - SSN masked edit box(disabled)

- The Participant List grid is initially blank.
- The Show Details panel is initially hidden.

3.1.2.2 Edits for Search Criteria

Upon selection of the Search button

- When the State WIC ID radio button is selected and an entry is not made in the State WIC ID field, the system will invoke a standard error message with the text, “An entry is required for the State WIC ID.”
- When the Household ID radio button is selected and an entry is not made in the Household ID field, the system will invoke a standard error message with the text “An entry is required for the Household ID.”
- When the Demographics radio button is selected, and an entry is not made in at least one of the following controls, the system will invoke a standard error message with the text “An entry is required for at least one of the Demographics fields to perform a search.”:
 - Last Name text box
 - First Name text box
 - Middle Initial text box
 - Date of Birth masked edit box
 - SSN masked edit box
- If an invalid date is entered in the Date of Birth masked edit box, the system will invoke a standard error message with the text “Invalid date entered.”
- If the value entered into the Date of Birth masked edit box is greater than the system date the system will invoke a standard error message with the text ‘Date entered must be less than or equal to today’s date.’

3.1.2.3 Display Participant List

Upon successful completion of the above listed edits:

- If a value exists, the system will perform a *soft search* combined with a *Soundex* search on the ‘Last Name’ and ‘First Name’ fields. (For example, if the user performs a search on the Last Name of ‘PATTER’, a combined *Soundex* and *soft search* would yield results similar to the following: PADDER, PADDERSON, PATTER, PATTERSON, POTTER, POTTERSON, POTTERS.)
- The system will provide a *hard search* for the remaining controls.
- The system will display all records found meeting the criteria in the Participant List Grid.
- The title of the Participant List window will be set to “Central Administrative Site - Participant List – Local Database” The first record in the list will be initially selected.

- If no records are found that meet the search criteria, the system will invoke a standard message with the text “No participant matching your search criteria could be found ” Upon dismissal of the message, the system will then return to the Participant List window preserving the previously entered search criteria.

3.1.2.4 Clear

Upon selection of the Clear button, the system will clear and reset all controls on the Participant List window.

3.1.2.5 Show Details

Upon selection of the Show Details button, the system will display the details for the selected participant in the Show Details panel.

3.1.2.6 Hide Details

Upon selection of the Hide Details button, the system will hide the Show Details panel.

3.1.2.7 Saving the Data

There are no updateable controls on this window; therefore no data is saved to the database.

3.1.2.8 Data Map

There are no updateable controls on this window; therefore no data is saved to the database.

3.2 Menus

The menus presented on the Participant List window provide mouse and keyboard functionality to functions within the Central Administrative Site application. The list will consist of the following menus:

- File
- Participant List
- Activities
- Breastfeeding
- Help

3.2.1 File Menu

This File menu contains menu items for invoking the various global features of the Central Administrative Site application. It will have a mnemonic of 'F'. When hovering over or selecting a file menu item, if a sub-list of items is available, the sub-list will automatically expand and be invoked. The File menu will invoke as follows:

- File
 - System Outputs
 - System Tools
 - Exit

3.2.1.1 System Outputs Menu Item

This menu item allows the user to invoke the System Outputs function. This menu item will be enabled when the File menu is active. It has a mnemonic of 'O'.

3.2.1.2 System Tools Menu Item

This menu item allows the user to invoke the System Tools function. This menu item will be enabled when the File menu is active. It has a mnemonic of 'S'.

3.2.1.3 Exit Menu Item

This menu item allows the user to exit the Central Administrative Site application. This menu item will be enabled when the File menu is active. It has a mnemonic of 'X'.

3.2.2 File Menu Processes

Upon selecting the System Outputs menu item, the system will expand the sub-menu as follows:

- System Outputs
 - Reports

Upon Selection of the Reports sub-menu item, the system will invoke the Generate Reports dialog described in *System Outputs*.

Upon selecting the System Tools menu item, the system will expand the sub-menu as follows:

- System Tools
 - Change Password
 - Set Default Printers

Upon selection of the Change Password sub-menu item, then system will invoke the Change Password dialog as described in *Security*.

Upon selection of the Set Default Printers sub-menu item, the system will invoke the Select Printers for Workstation dialog as described in as described in *System Tools*

Upon selection of the Exit menu item:

- The system will close and exit the Central Administrative Site Application.

3.2.3 Participant List Menu

This menu contains menu items that allow the user to access functions of the participant list. The menu will be enabled when the Participant List window is active. The Participant List menu will be displayed as follows:

- Participant List
 - Open Participant Folder

3.2.3.1 Open Participant Folder Menu Item

This menu item allows the user to open a participant's folder. The menu item will be enabled when the Participant List menu is active and a participant record is selected on the participant list. It has a mnemonic of 'P'.

This menu item will be disabled when the current view of the participant list grid is empty or when no entry is selected in the Participant List grid.

3.2.4 Participant List Menu Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Menu.

Upon selection of the Open Participant Folder menu item:

- The system will check the permissions for the currently logged-on user to determine if they have the appropriate permissions to view the participant folder. When the user does not have the appropriate permissions, the system will invoke a standard error message with the text "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."
- The system will open the Participant Folder for the currently selected household member. The Participant Folder is described in this document.

3.2.5 Activities Menu

This menu contains menu items that allow the user to perform functions on groups of participants. This menu will be enabled when the Participant List window is active. The Activities menu will be displayed as follows:

- Activities
 - Build Master Calendar

3.2.5.1 Build Master Calendar Menu Item

This menu item allows the user to invoke the Build Master Calendar function. This menu item will always be enabled when the system menu bar is accessible. It has a mnemonic of “B” and does not have a shortcut key.

3.2.6 Activities Menu Processes

Upon selection the Build Master Calendar menu item:

- The system will check the permissions of the currently logged-on user to determine if they have the appropriate permissions to access the Build Master Calendar function. If the user does not have appropriate permissions, the system will invoke a standard error message with the text “You do not have the necessary permissions to view the Master Calendar data. Please see the supervisor.”
- The system will invoke the Build Master Calendar dialog.

3.2.7 Breastfeeding Menu

This Breastfeeding menu contains menu items for invoking the Breastfeeding Item Issuance History function. When hovering over or selecting a menu item, if a sub-list of items is available, the sub-list will automatically expand. The Breastfeeding menu will expand as follows:

- Breastfeeding
 - Breastfeeding Item Issuance History

3.2.7.1 Breastfeeding Item Issuance History Menu Item

This menu item allows the user to invoke the Breastfeeding Item Issuance History function. This menu item will be enabled when the Breastfeeding menu is active. It has a mnemonic of ‘B’.

3.2.8 Breastfeeding Menu Processes

Upon selection the Breastfeeding menu item:

- The system will check the permissions of the currently logged-on user to determine if they have the BreastfeedingItemIssuance.View permissions to access the Breastfeeding Item Issuance function. If the user does not have appropriate permissions, the system will invoke a standard error message with the text “You do not have the necessary permissions to view Breastfeeding Item Issuance. Please see the supervisor.”
- If the user does have the BreastfeedingItemIssuance.View permissions, the system will invoke the [Breastfeeding Item Issuance History dialog](#) described in this document.

3.2.9 Help Menu

The Help menu is provided to assist the user in finding answers to questions about how to use the Central Administrative Site application. This menu item will be enabled when the File menu is accessible. It has a mnemonic of ‘H’. The Help menu will be displayed as follows:

- Help
 - Help on Screen
 - WIC Help Topics
 - About

3.2.9.1 Help on Screen

This menu item will allow the user to view panel-level help for the currently invoked screen. This menu item will be enabled when the Help Menu is active. This menu item has a mnemonic of ‘S’ and a shortcut key of ‘F1’.

3.2.9.2 WIC Help Topics Menu Item

This menu item will allow the user to view a list of help topics for the WIC system. This menu item will be enabled when the Help Menu is active. It has a mnemonic of ‘W’.

3.2.9.3 About WIC Menu Item

This menu item allows the user to view information about the software. This menu item will be enabled when the Help Menu is active. It has a mnemonic of ‘A’.

3.2.10 Help Menu Processes

Upon selection of the Help on Screen menu item, the system will invoke the Central Administrative Site application panel level help. This function is also invoked when pressing the F1 key.

Upon selection of the WIC Help Topics menu item, the system will invoke the Help Topics: Central Administrative Site Help System at the Index tab of the help function.

Upon selection of the About WIC menu item, the system will invoke the About WIC application information dialog.

3.2.11 Toolbar

In addition to the system toolbar options, when the participant list is active several additional toolbar options are available.



Figure 3 - Participant List Toolbar

3.2.11.1 Manage Waiting List Toolbar Button

This toolbar button allows the user to manage the waiting list. It will be disabled when the Participant List is active in the Central Administrative Site application. It has a tool tip text of “Manage Waiting List”.

3.2.11.2 System Outputs Toolbar Button

This toolbar button allows the user to invoke the System Outputs function. It will be enabled when the Participant List is active. It has a tool tip text of “System Outputs”.

3.2.11.3 System Tools Toolbar Button

This toolbar button allows the user to invoke the System Tools function. It will be enabled when the Participant List is active. It has a tool tip text of “System Tools”.

3.2.11.4 Exit Toolbar Button

This toolbar button allows the user to exit the Central Administrative Site application. It will be enabled when the Participant List is active. It has a tool tip text of “Exit Central Administrative Site Application”.

3.2.11.5 Build Master Calendar Toolbar Button

This toolbar button allows the user to invoke the Build Service Site Calendar function. This toolbar button will be enabled when the Participant List window is active. It has a tool tip text of “Build Master Calendar”.

3.2.11.6 Open Participant Folder Toolbar Button

This toolbar button allows the user to open a participant’s folder. This toolbar button will be enabled when the Participant List Window is active and a participant record is selected on the participant list. It has a tool tip text of “Open Participant Folder.”

3.2.12 Toolbar Processing

Upon selecting the System Outputs toolbar button, the system will invoke the Generate Reports dialog described in Chapter 05 - System Outputs.

Upon selecting the System Tools toolbar button, the system will expand the sub-menu as follows:

- System Tools
 - Change Password (mnemonic of ‘P’)
Upon selection of the Change Password sub-menu item, the system will invoke the [Set Password dialog](#) as described in Application Administration - *Chapter 2 – Security*.
 - Set Default Printers (mnemonic of ‘D’)
Upon selection of the Set Default Printers sub-menu item, the system will invoke the [Default Printers dialog](#) as described in as described in Common Interface Panels *Chapter S - System Tools*

Upon selection of the Exit toolbar button, the system will close and exit the Central Administrative Site Application..

Upon selection of the Build Master Calendar toolbar button:

- The system will check the permissions of the currently logged-on user. If the user does not have at least the MasterCalendar.View permission, the system will invoke a standard error message with the text “You do not have the necessary permissions view the master calendar. Please see the supervisor.”
- If the user has the appropriate permission, the system will invoke the Build Service Site Calendar dialog described in [Chapter 02 - Build Master Calendar](#).

Upon selection of the Open Participant Folder toolbar button

- The system will check the permissions for the currently logged-on user to determine if they have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Check Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, Diet Intake History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications. When the user does not have the any above listed permissions, the system will invoke a standard error message with the text “You do not have the necessary permissions to view the Participant Folder. Please see the supervisor.”
- If the user has at least View level access defined for any of the following features the system will invoke the Participant Folder for the currently selected household member in read-only mode.
- The system will check the permissions for the user logged-on to determine the permission level for Displaying Alerts as defined in Common Interface Panels – [*Chapter C - Display Alerts for Household Member*](#) - as well as the Alert type to display. The alerts will be displayed as follows:
 - If the Alert is a protected alert and the user does not have the ProtectedAlert.View permission, the alert will not be displayed.
 - If the Alert is a protected alert and the user does have the ProtectedAlert.View permission, the alert will be displayed
 - If the Alert is a non-protected alert and the user does not have the Alert.View permission, the non-protected alert will not be displayed.
 - If the Alert is non-protected alert and the user does have the Alert.View permission, the non-protected alert will be displayed
 - If no alerts exist or the system determines the user does not have the permissions described, the Display Alerts dialog will be bypassed.

3.3 Participant Folder

The Participant Folder is a view of information for the participant segmented into separate screens similar to the way a paper-based hanging file is separated by individual file folder tabs. A folder may be opened in one of several ways:

- double-clicking on an item in the Participant List
- selecting a participant from the Participant List and selecting the Open Participant Folder option on the Participant List menu
- selecting a participant from the Participant List and selecting the Open Folder toolbar button

3.3.1 Initializing the Interface

Upon initial display, set the title bar text to “Member.FirstName
Member.MiddleInitial Member.LastName – [Descriptive Value of Age](#) – WIC
ID: Member.StateWICID Household ID: Member.HouseholdID”

Descriptive Value of Age
For ‘Infant’ display ‘XX’ Months ‘XX’ Days, calculated from the Date of Birth.
For ‘Child’ display ‘XX’ Year(s) ‘XX’ Months ‘XX’ Days calculated from the Date of Birth
For ‘Pregnant’ display ‘XX’ weeks gestation calculated from LMP
For ‘Breastfeeding’ and ‘Non-breastfeeding’ display ‘XX’ Years calculated from the Date of Birth

If the participant or a member of the participant’s household is flagged for an Alert, upon opening the participant’s folder, the system will automatically invoke the Display Alerts dialog defined in the Common Interfaces Panels – [Chapter C – Display Alerts for Household Member](#). However, the Delete Alert button will not be visible. Deleting an alert is not allowed when the dialog is displayed in CAS mode.

The default tab displayed when the Participant Folder is opened will be the first available tab for which the user is granted permission. Refer to *Security*. The controls on the tab will be locked and the values cannot be modified. When the user permissions are 'None' for a tab, the tab will be disabled and not available for selection. The following is a list of folder tabs available and the order in which the default and user permissions are verified when a participant folder is open:

Tab
Demographics
Height/Weight/Blood (HT\WT\Blood)
Diet Intake
Risk Factors
Food Prescription
Nutrition Education
Checks History
Immunizations
Referrals
Health Information tab [Infant/Child]
Health Information tab [Woman]
Income History
Appointments

Once a folder is opened, depending on the WIC Category of the participant (or applicant) the folder will enable only those tabs and controls that apply to only the WIC Category of the participant. Refer to the respective tabs for specific information on Participant Folder tabs and sub-tabs.

3.3.2 Edits (Participant Folder)

Data may not be modified in the Participant Folder in the Central Administrative Site application. The information displayed is view only.

3.3.3 Toolbar Exceptions

In addition to the system toolbar options, when the Participant Folder is active several additional toolbar options are available.

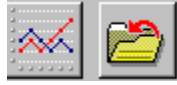


Figure 4- Participant List Menu

3.3.3.1 *Print Participant Summary Toolbar Button*



This toolbar button allows the user to produce the Participant Summary Report for the participant whose Folder is displayed. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of “Print Participant Summary”.

3.3.3.2 *Close Participant Folder Toolbar Button*



This toolbar button allows the user to close the Participant Folder and return to the participant list. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of “Close Participant Folder”.

3.3.4 Processing

3.3.4.1 *Print Participant Summary*

Upon selection of the Print Participant Summary toolbar button:

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the system will invoke the [Produce Participant Summary](#) dialog as defined in *Clinic – Chapter 09 – Participant Folder*.

3.3.4.2 *Work with Another Household Member*

Upon selection of this option, the system invokes the Work with Another Household Member window described in Chapter B – Work with Another Household Member.

3.3.4.3 Close Participant Folder

Upon selection of this option, the system closes the Participant Folder and returns to the Participant List. When the participant whose folder was opened still remains on that view of the Participant List, their record will be selected.

3.4 Menu Exceptions

In addition to the system menu options, when the Participant Folder is active, several additional menu items are available.

3.4.1 Participant Activities Menu

The menu will be enabled when the Participant Folder Window is active. It has a mnemonic of “P”. It will display the following Menu Items:

- Print Participant Summary
- Breastpump Issuance History
- Work with Another Household Member
- Close Participant Folder

3.4.1.1 Print Participant Summary

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of “R”.

3.4.1.2 Breastpump Issuance History Menu Item

This menu item will be enabled when the Participant Folder is active. It has a mnemonic of “B”.

3.4.1.3 Work with Another Household Member Menu Item

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of “W”.

3.4.1.4 Close Participant Folder Menu Item

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of “C”. (See Processing for [Close Participant Folder Toolbar Button](#))

3.4.2 Participant Activities Menu Items Processing

Upon selection of the Print Participant Summary menu item,

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the system will invoke the [Produce Participant Summary](#) dialog as defined in Clinic – *Chapter 09 – Participant Folder*.

Upon selection of the Breastpump Issuance History menu item, the system will invoke the Breastpump Issuance History dialog.

Upon selection of the Work with Another Household Member menu item, the system will invoke the Work with Another Household Member dialog defined in Chapter B – Work with Another Household Member (Participant Folder)

Upon selection of the Close Participant Folder Menu Item, the system will function exactly as when selecting Close Participant Folder Toolbar Button as described in the next section of this document.

3.5 Breastfeeding Item Issuance History

The Breastfeeding Item Issuance History dialog allows the user to view the breastfeeding items that have been issued to the current participant. It is invoked when the user selects Breastfeeding > Item Issuance History menu item when the Participant Folder is active.

Date Issued	Item	Quantity	ID	Date Returned
11/16/2004	Breastmilk Bags	50	N/A	N/A
11/16/2004	Breastfeeding Kit	1	N/A	N/A
11/16/2004	Ameda Nuture III Multiple-use Electric Pump	1	002443	
10/01/2004	Nursing Bra	2	N/A	N/A
10/01/2004	Medela Single Deluxe Single-use Manual Pump	1	N/A	N/A
10/01/2004	Breastmilk Bags	50	N/A	N/A
10/01/2004	Breastfeeding Kit	1	N/A	N/A

Figure 5 – Breastfeeding Item Issuance History Dialog

3.5.1 Controls

The common controls for this dialog are described in Common Interface Panels - [Chapter P - Breastpumps, Breastfeeding Kits and Supplies](#)

3.5.2 Processes

3.5.2.1 Initializing the Interface

Upon initial display of the Breastfeeding Item Issuance History dialog:

- The title bar text will be set to “Breastfeeding Item Issuance History for [Name]” where [Name] is the first and last name of the participant.

- The date issued search criteria will be defaulted to include all items within the past 90 days. The To date control will be set to the current system date. The From date control will be set the current system date less 90 days.
- The item type criteria will be set to include only breast pumps.
- The Breastfeeding Item Issuance History display grid will be filled with items matching the aforementioned criteria.
- The Issue Items and Return Pump buttons are not visible.

3.5.2.2 Edits

There are no edits defined for this dialog.

3.5.2.3 Saving the Data

There are no updateable controls on this dialog; therefore, no data is written to the database.

3.5.2.4 Close

Upon selection of the Close button, the system will close the dialog and return to the calling window.